

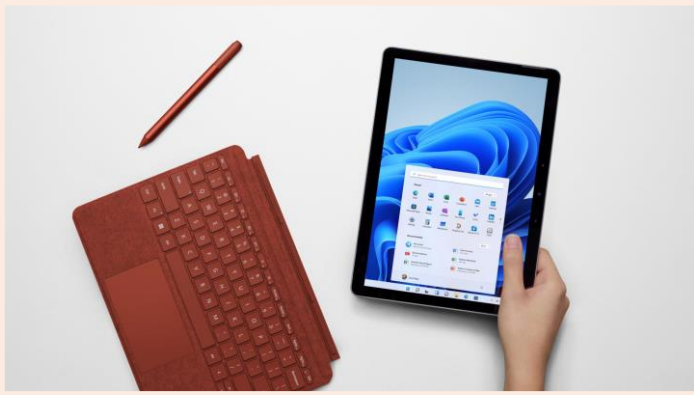


Microsoft Surface Protection Plans

Purchase and registration Quick Reference Guide

December 2022

Welcome



Hello,

This “Quick Reference Guide” provides a high-level overview on how to order and provision protection plans for eligible Microsoft Surface Products.

In this guide you will find:

- Step-by-step guide for protection plan purchase and registration
- Microsoft protection plan policies
- Protection plan purchase and registration process
- Details needed for registration
- Troubleshooting
- Common transaction failures
- Common Partner scenarios with a recommended approach
- Resources and where to get additional help

If you have further questions, or need more information after reviewing this guide, please see the “Resources and additional help” section for contact information.

Thank you!

Step-by-step guide for protection plan purchase and registration



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Know the Microsoft protection plan policies

Does the PURCHASE scenario meet the Microsoft Protection Plan Policy

Yes:

- Protection plan purchased by end-customer **within 45-days** of the device order date
- Protection plan registered **within 10-days** of the device & protection plan purchase date (if purchased at the same time)
- The protection plan SKU matches the “bill to” country of the end-customer billing entity

No:

- Protection plan purchased by end-customer **more than 45-days** after the device order date
- Protection plan was registered **more than 10-days after** the protection plan order date
- It is demo device or has an E-SKU, as they are not eligible for the sale of a Microsoft Protection Plan

Other details:

- Protection plan returns are accepted for a full refund if the submission date of the return request is within 30 days of the protection plan order date and no claims have been processed against the Product. If the Protection plan was submitted via the Automated SCADE API, you can submit the return request via the SCADE API. If the plan was purchased via the SCADE API but you are outside of 30 days, please contact the Microsoft Digital Queries team. For all other scenarios, please contact your Regional Returns Team.
- Protection plans are non-transferable from one device or entity (See Terms and Conditions)
- OEM (manufacturer's limited warranty) start date is based on order date and immediate availability of inventory. In the event of supply constraints, the Distributorship date may be used as the device purchase date.

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Protection plan purchase and registration process

- 1 The purchase**
 - Microsoft Protection Plan and device are purchased from an Authorized Reseller by end-customer
 - End-customer sends order to Reseller
- 2 The purchase is reported to Reseller**
 - Reseller creates Purchase Order for device and protection plan and sends to Partner
 - Reseller provides end-customer purchase order details
- 3 Partner submits registration request**
 - Reseller provides the registration details, including serial number and protection plan SKU to Partner
 - SCADE enabled Partners submit via SCADE API.
 - Non SCADE enabled Partners must place an order via the MPC process and then submit via manual template to (bulk_crr@microsoft.com)
- 4 Automated process (SCADE) transactions**
 - If the transaction is accepted, nothing further is required
 - If the transaction fails, see the "Troubleshooting" section of this guide to resolve errors and resubmit

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Checklist of what's needed for registration

- | | |
|---|--|
| <input type="checkbox"/> Distributor PO and email address | Purchase Order number created for order from Partner to Microsoft and email of Partner. |
| <input type="checkbox"/> Reseller PO, name and email address | Purchase Order number created for order from Reseller to Partner, along with Reseller name and email address. |
| <input type="checkbox"/> End-customer PO | Purchase order number created for order from end-customer to Reseller |
| <input type="checkbox"/> Order ID | Not mandatory |
| <input type="checkbox"/> Device serial number and purchase date | Serial number of device that protection plan needs to be attached to (12, 14, or 16 alpha-numeric digits) and purchase date. |
| <input type="checkbox"/> Warranty part number | Microsoft SKU of protection plan sold (format XXX-NNNNN) |
| <input type="checkbox"/> Warranty purchase date and Device purchase date | Purchase order creation date from end-customer to Reseller for protection plan and device (format must be MM/DD/YYYY) |
| <input type="checkbox"/> Sell price protection plan | Price at which protection plan was sold to end-customer by Reseller |
| <input type="checkbox"/> Quantity of protection plans | Value will always need to be filled in as 1 (one) |
| <input type="checkbox"/> Customer company name, address and country code | Company name, address, and country code of the end-customer on purchase order (Country code needs to be in Alpha-3 format) |
| <input type="checkbox"/> Customer first name and customer last name | The first and last name of the customer that is placing the order on behalf of their company |
| <input type="checkbox"/> Phone number and email of end-customer | Phone number and email of end-customer or company |

Troubleshooting



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Common transaction failures

Invalid device serial number

- Incorrectly entering a device serial number will cause a transaction failure. For example, including a space or additional character or not starting with the beginning 0(s).
- If a claim was previously submitted on a device's serial number, the transaction will fail. For dead on arrival (DOA) units follow the DOA process, do not use protection plan benefits as this will terminate device eligibility.
- Serial numbers can be 12 digit numeric, 14 digit alphanumeric, or 18 digit alphanumeric.

Outside of policy timeline

- The sale of Microsoft Protection plan must be submitted for provisioning within 10 days of the protection plan purchase date. If protection plans are submitted for provisioning more than 10 days after the sale date, the transaction will fail.
- Standalone protection plans must be sold within 45 days of device purchase. If protection plans are sold more than 45 days after the device sale date, (OEM warranty start date) the transaction will fail.

Protection plan SKU does not match device type

- Protection plans must be sold for a compatible device. For example, laptop protection plan SKU is required for a laptop device. If the device type and protection plan are not compatible, the transaction will fail.

Email addresses are not unique

- Submissions require three unique email addresses (e.g., customer, Reseller, and Partner email addresses cannot be the same), or the transaction will fail.
- If the Reseller is selling to themselves, they still must submit two unique email addresses.

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Return failure

- Returns must be transacted via SCADE within 30 days of the protection plan purchase date.
- Only plans that were provisioned via SCADE may continue to leverage SCADE for the returns process. Manually provisioned transactions must be returned through the original manual process. The same 30 day return period timeline applies for all.

Demo device SKUs

- Demo devices are not eligible for protection plans and will be rejected in SCADE.

Stacking SKUs (Value added service)

- If adding a Value-Added Service (VAS) SKU, the base Extended Hardware (EHS) SKU or the Complete for Business (CFB) SKU must be provisioned through SCADE or manually first. Then, a second transaction can be run to add all stacking (VAS) SKUs.

Country must match/Cross-selling – Europe only

- The protection plan country SKU must match the country on the bill-to line of the PO submitted by the customer, even if the device SKU is from another region.

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Common Partner scenarios

1. Supply Constraints/partial device shipment

Scenario example:

- A Partner orders 100 devices and protection plans, only 75 devices are available due to supply constraints. Once the order is complete, the Partner waits and tries to register all 100 protection plans, the registrations are rejected.

Issue(s):

- In this scenario, the customer is receiving and using devices without protection plans as the protection plans are not being registered until the full order is fulfilled.

Required action(s):

- Register protection plans as devices are shipped out by the Reseller, do not wait for the entire order to be fulfilled.
- If the reseller's system does not allow split orders, the Reseller may need to request two separate PO's from the end-customer. The first PO would cover the first 75 devices, the second P.O. would cover the remaining 25 devices.
- If there is a Microsoft supply constraint, when a Partner provisions the device, the ship date can be used as the warranty start date instead of the device purchase date.

Customer benefits:

- The customer gets the warranty applied to the device prior to use.
- The customer gets the warranty for the correct time.

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2. Customer owned inventory/partial device shipment

Scenario example:

- The end-customer orders 100 devices and protection plans. There is an agreement between the end-customer and the Reseller to ship 10 of the 100 devices every month. Ten months later when the Reseller has shipped all 100 devices, the Reseller sends warranty registration to Microsoft and it is rejected.

Issue(s):

- The time period indicated (up to 10 months for some devices) violates the 10-days from purchase to register devices policy; assuming the protection plan was purchased with the device as indicated in the scenario.
- The end-customer has had devices in-hand, without warranty for up to 10 months.

Recommended action(s):

- End-customer held inventory at the reseller will need to have protection plans registered within 10 days of the time of sale regardless of delivery time of the device to end-customer. Register all devices within 10 days of time of sale.

Customer benefits:

- The customer gets the warranty applied to the device prior to use.

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3. Manual exception process turnaround time

Scenario example:

- Partner submits exception, dependent on the scenario it can take multiple weeks to get a resolution.

Issue(s):

- Microsoft will work through any exceptions as soon as possible to reduce any customer satisfaction issues related to Microsoft Protection Plans.
- Most manual exceptions are preventable as they are related to missed registrations by partners.

Recommended action(s):

- Alleviate the need for a manual exception and save time by provisioning via SCADE at the time of sale.
- Follow the steps in this guide, use the troubleshooting tips, and decrease the number of SCADE manual exceptions submitted.

Customer benefits:

- Avoid the need to submit a manual exception. This will save time and decrease the number of manual exceptions in the queue so the remaining exceptions may be processed faster.

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4. Warranty-Serial Number look up tool/bulk look up

Scenario example:

- The Partner wants to look up multiple protection plans at once. The ROBO tool is a single serial number search tool as of now. Microsoft is currently in testing to further the capabilities of ROBO to include bulk serial number look-up.

Issue(s):

- The Partner has a large order and the ROBO tool will take a long time to use for one device at a time.

Recommended action(s):

- To check compatibility or eligibility for a set of devices (in bulk) use the "Check Eligibility" API which is currently available via SCADE. For any questions related to the "Check Eligibility" API, please refer to your SCADE Spec Document or reach out to Scadesupp@microsoft.com for a copy of the document.

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5. SCADE API

Scenario example:

- The Partner submits 20 warranty orders, 2 of the orders fail.

Issue(s):

- It is time consuming to have warranty order fail.

Recommended action(s):

- Run the "Check Eligibility" API call first. The "Check Eligibility" API call is the first API that should be called before trying to provision a protection plan. This request checks if all the fields entered are valid, if the Protection Plan SKU and the device are compatible with each other, and that the protection plan is being sold in a country that it is available in.
- If all device serial numbers pass, use the "Fulfill API" to complete processing the order.
- For device serial numbers that don't pass: 1) check your price list for compatibility 2) if the compatibility matches, contact Scadesupp@microsoft.com for further guidance.

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Surface Partner Page

<https://partner.microsoft.com/en-us/surface>

SCADE Post-Launch Support Deck

- SCADE is the automated (API) registration of the device with end-customer details, and protection plan purchase and provisioning from the Partner to Microsoft.
- This document is presented to each Partner at launch, after SCADE onboarding is complete. If you need a copy, please contact: Scadesupp@microsoft.com. The content includes:
 - Manual process → Automated/SCADE process
 - Policy review
 - Common SCADE transaction failures
 - Error messages, meaning, and actions
 - Process for post-launch support

Warranty-Serial number lookup

- For a large quantity or an individual serial number lookup, use the "Check Eligibility" API in SCADE.
- [ROBO](#) can also be used for an individual serial number lookup.

Additional Help

Before contacting Microsoft for assistance, please utilize the checklist below:

1. For transaction failures, please troubleshoot by reviewing the error message provided and refer to the "SCADE Post-Launch Support Deck" for a list of error messages and recommendations. If you believe this error should not have occurred after reviewing the document, please contact: Scadesupp@microsoft.com.
2. For credit/invoice inquiries, please contact: digiops@microsoft.com.
3. For assistance with exceptions and manual processing requests please contact your PDM.